Expert Training

Four Modules

Expert Training is composed of four modules, listed across the top of the screen. You can complete them in any order, but completing them from left to right is recommended. For an overview of each module, tap on the corresponding module title.

Flexible Format

The training can be led by a facilitator or it can be experienced as self-led, group learning. Ideal number of participants is 6—12, and for facilitated groups, the number of participants can increase to 20.

Exploratory and Collaborative

Each module has a several topics and activities to explore together.
You'll use the horizontal navigation bar near the top of the screen to navigate each module.
Don't perform the activities in front of customers.

Measurable

You'll record your accomplishments and growth opportunities in your Exchange Journal when you complete each module. Make sure to set up a meeting with your Leader to discuss what you learned.

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Expert Training

Module: **2 hrs.**

Module Overview

Get an overview of the Expert role and how you are measured.

Audience

This module is designed for new Experts.

Key Messages

- Experts' primary job is to create owners.
- Experts are team players who set the example in the Red Zone.
- Experts' role is different from that of Specialists and that of Leaders.

Objectives

- Distinguish between the Expert role and the roles of Specialists and Leaders.
- Explain how meeting the *Expert Performance Criteria* supports the business.

Topic 1:
The Expert Job
1 h 40 min.

Topic 2:
How Experts are Measured
30 min.

Topic 3:
Exchange Journal
30 min.

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Expert Training

Room Setup

- Flip chart paper or whiteboard space
- Flip chart or dry-erase markers
- Ballpoint pen for each Expert

Digital Materials

Each participant should have a RetailMe iPad with these items downloaded:

- This guide
- *Expert Job Description*
- *Specialist Job Description*
- *Leader Job Description*
- *Expert Performance Criteria*

Print Materials

Tap the document name below to view and print. If no AirPrint printer is available, open this guide on a Mac and print it.

- Fill in the Blanks

Swipe to Explore ❯

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Expert Training

Activity: **10 min.**

Topic 1: The Expert Job

Fill in the Blanks

Do you remember the official Expert job description?
Take 2 minutes to fill in the blanks on a printout of the Fill in the Blanks page.

Next ❯

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Fill in the blanks

Do you remember the official Expert job description?
Take 2 minutes to fill in the blanks with the listed words or phrases.

Expert Job Summary

The primary responsibility of an Expert is to _____ Apple products. An Expert _____ and _____ the behaviors expected of our highest Red Zone performers and possesses a deep _____ of Apple hardware, software, and third-party products. Using exceptional _____ and _____ skills, Experts create a _____ customer experience and build customer_____. A strong _____ , the Expert is a _____ who achieves _____ in their market by passionately _____ and showcasing _____.

Apple technology	team player	customer experience	model	sell	interpersonal	engaging customers
first-tier performer	loyalty	world-class	technical understanding	influences	top results	

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Expert Training

Activity: **30 min.**

Topic 1: The Expert Job

The Expert Job Description

1. Read

Expert Job Description

2. Reflect

- Did anything in the job description surprise you?
- Does this job description match what you do in your job?
- How does the Expert's role differ from that of a Specialist?
- How does the Expert's role differ from that of a Leader?

3. Discuss

- How does the Expert role support the Apple Retail Store?
- Write any questions you have about the Expert job description. You'll ask a Leader these questions later.

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Expert Training

Activity: **30 min.**

Topic 2: How Experts are Measured

1. Explore

Expert Performance Criteria

- What categories are included in the *Expert Performance Criteria*?
- How is each category weighted?
- Which Red Zone metrics are used to measure Experts' performance?
- Which data points are used to measure Experts' performance?

2. Reflect

- Is this criteria a fair way to assess your performance?
- Which reports can you use to monitor your daily performance? How do you get those reports?
- How does your performance affect other team members' performance? How does it affect your store's performance?

3. Discuss

- How does the *Performance Criteria* connect to the *Expert Job Description*?

Next ❯

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Expert Training

Activity: **30 min.**

Topic 3: Exchange Journal

Consider these points as you reflect on your learning experience:

- What are the main scope and duties of your role as an Expert?
- Explain the most important area in which you can continue to grow as an Expert.
- How will your teammates, customers, or leadership team know that you have made this improvement?

Partner with a Leader

Partner with a Leader individually to review and discuss your learning experience.

Leader Notes

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Expert Training

Leader Notes: Exchange Journal

Have a conversation with each Expert about his or her:

- Top strengths
- Growth opportunities
- Role expectations

Back to Activity

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Expert Training

Resources

RetailMe

- *Expert Job Description*
- *Expert Performance Criteria*

Congratulations! You've completed Module 1: "The Expert Job."

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Expert Training

Module: **2 hrs., 15 min.**

Module Overview

Learn the concept of *first follower*, and how Experts play a role in leading change and supporting business priorities.

Audience

This module is designed for new or experienced Experts.

Key Messages

- Apple depends upon Experts to be the *first followers*, the earliest adopters of change and inspiration to other team members.
- Your knowledge and experience as Experts enable you to be the natural influencers of positive change in your store.
- As Experts, there are actions you can take to influence the team to embrace and support the priorities.

Objectives

- Name three new actions you can take to be a *first follower* in your store.

Topic 1:
Change in Your Life
30 min.

Topic 2:
First Follower
20-40 min.

Topic 3:
Modeling Change
30 min.

Topic 4:
Business Priorities
20 min.

Topic 5:
Exchange Journal
15 min.

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Expert Training

Room Setup

- Flip chart paper or whiteboard space
- Flip chart or dry-erase markers
- Notebook or paper for each Expert
- Ballpoint pen for each Expert

Digital Materials

Each participant should have a RetailMe iPad with these items downloaded:

- This guide
- TED Video: Derek Sivers, “How to Start a Movement”

For translations of the video, click on your language from the Show Transcript pull-down menu on the TED website.

Swipe to Explore ❯

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Expert Training

Activity: **30 min.**

Topic 1: Change in Your Life

1. Reflect

Reflect on these questions individually. Write down your responses if you wish.

- What's the biggest change you've made in your life?
- What inspired you to make that change?
- Describe an experience in which you've inspired others to make a change.
- How did you do it?

2. Share

Share your responses.

> *To improve is to change; to be perfect is to change often.*
>
> — *Winston Churchill*

Next ❯

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Expert Training

Activity: **20 min.**

Topic 2: First Follower

1. Explore

- Watch the TED video: Derek Sivers, “How to Start a Movement”

2. Reflect

- How does the leader treat the *first follower*?
- What qualities does the *first follower* display?
- Who do the other participants look to for guidance?
- What would happen if the *first follower* gave up and walked away?

3. Discuss

- Did he know he was going to start a movement?
- What happens when Experts are resistant or slow to adopt change?
- How is the *first follower* role different from the role of a leader or a mentor?
- What will you do, as an Expert, to be a *first follower*?

Apple depends upon Experts to be the *first followers*, the earliest adopters of change and inspiration to other team members.

Facilitator Tip

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Expert Training

Facilitator Tip: First Follower

Be sure to discuss these points during the activity:

- *First followers* don't originate changes—they inspire confidence and model changes in ways others can understand.
- *First follower* is an underestimated form of leadership.
- Others join because of the *first follower*.
- A follower is what transforms an individual into a leader.
- It takes courage to be a *first follower* and to show others how to follow.

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Expert Training

Activity: **20 min.**

Topic 2: First Follower

Optional activity: 6 people minimum

Identify the First Follower

1. Participants stand in a circle.
2. Choose one person to leave the room briefly.
3. Choose someone to be the *first follower*.

   This person:
   - Can't talk
   - Will make a simple gesture such as scratching, wiggling fingers, or bouncing. This gesture represents a new strategy that Apple is introducing to our stores
   - Will change this gesture every 15 seconds, to represent new initiatives that are introduced
4. Ask the person to return to the room. This person's challenge is to identify the *first follower*.
5. This person has 2 minutes and two guesses to identify the *first follower*.
6. Repeat the activity twice. Choose a different person to leave the room each time.

Discuss

- Was it easy to follow the *first follower's* gestures?
- What would happen if the *first follower* were the only person who made the gesture? What if many people started their own gestures?
- How does this activity simulate the Expert role?

Facilitator Tip

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Expert Training

Facilitator Tip: Identify the First Follower

Be sure to discuss these points during the activity:

- A good role model should lead through clear, simple actions that are easy to understand and adopt.
- If the *first follower* were the only one who gestured, the group wouldn't appear to be a unified team.
- Experts are expected to be the first to adopt change and to clearly model behaviors for other members of the Red Zone to emulate.

Back to Activity

Next ❯

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Expert Training

Activity: **30 min.**

Topic 3: Modeling Change

1. Put First Follower into Practice

For each of these situations:
- Describe three actions you, as an individual Expert, could do to be a *first follower*.
- Describe one action, you as a team of Experts, could do to be *first followers*.
- Write these ideas on flip charts or whiteboard space.

New Product Launch	**iPhone Sales Slump**	**Market Leader Visit**	**BOH Understaffed**
New Service Offering	**Others' Success**	**Unhappy Customer**	**Harassment**
Apple Rumors	**New Team Members**	**Thief?**	**Personal Setup**

2. Discuss

After you've identified how to put *first follower* into practice, discuss these questions:
- Was it easy to determine specifically what a *first follower* should do?
- How do the actions the individual Expert takes differ from the actions you can take as an Expert team?

Swipe to Set Goals ❯

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Expert Training

Activity: **20 min.**

Topic 4: Business Priorities

1. Partner with a Leader

Partner with a Leader as an Expert team to learn about business priorities.

2. Reflect

Reflect on these questions individually. Write down your responses if you wish.

- What is one action you can take to support each of the current business priorities as an individual?
- What is one action you can take to support each of the current business priorities as an Expert team?

Leader Notes

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Expert Training

Activity: **20 min.**

Leader Notes: Business Priorities

Explain:

- The purpose of quarterly business priorities.
- Who sets the priorities.
- The current quarterly business priorities.

Ask:

- What questions do you have about these business priorities?
- What actions can you take, as individuals, to embrace the business priorities?
- How can you, as an Expert team, support the business priorities?

Reinforce:

- As an Expert, there are actions you can take to influence the team to embrace and support the priorities.

Back to Activity

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Expert Training

Activity: **15 min.**

Topic 5: Exchange Journal

Consider these points as you reflect on your learning experience:

- Describe at least three actions you can take to inspire others as a first follower.
- What can you do to support the business priorities?
- Explain the most important area in which you can continue to grow as an Expert.
- How will your teammates, customers, or leadership team know that you have made this improvement?

Partner with a Leader

As an Expert team, partner with a leader to discuss your action plans to embrace and support the current business priorities.

Partner with a Leader individually to review and discuss your learning experience.

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Expert Training

Resources

TED website

- TED Video: Derek Sivers, “How to Start a Movement”

Feedback

Give us your feedback on this training.

- Participant Feedback Survey
- ISGT and Leadership Feedback Survey

Congratulations! You’ve completed Module 2: “Modeling Change.”

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Expert Training

Module: **2 hrs., 15 min.**

Module Overview

Use NetPromoter to identify opportunities to better serve your customers. Learn how confidence, independence, and loyalty can affect a customers' shopping experiences and how you can tailor your interactions to create world-class shopping experiences that result in loyal owners.

Audience

The primary audience for this module is new Experts, however experienced Experts can also benefit from this module.

Key Messages

- NetPromoter is a valuable tool to better understand Customer Journeys in your store.
- It's your job to discover insights about your customers so you can tailor your interactions to create high-quality shopping experiences tailored to customers' needs and values.

Objectives

- Gather relevant data from the NetPromoter system to uncover opportunities for improving the Customer Journey in your store.
- Map shopping journeys to identify pivotal moments and connect them to customer behaviors, expectations, and emotions.
- Determine the preferred shopping style for each of your customers.
- Adjust your technique to meet customers' needs and values.
- Inspire other team members to tailor their interactions with customers.

Topic 1:
NetPromoter
30 min.

Topic 2:
Your Customer Journey
15 min.

Topic 3:
Ownership and Loyalty
1 hr.

Topic 4:
Meet the Whole Customer
30 min.

Topic 5:
Exchange Journal
15 min.

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Expert Training

Prerequisites

Before starting this module, participants must complete the following RetailMe courses. If you haven't taken these courses recently, complete them again:

- *NetPromoter Introduction*
- *NetPromoter System*

Room Setup

- Flip chart paper or whiteboard space
- Flip chart or dry-erase markers
- Notebook or paper for each Expert
- Ballpoint pen for each Expert

Digital Materials

Each participant should have a RetailMe iPad with these items downloaded:

- This guide

Print Materials

Tap the document name to view and print. If no AirPrint printer is available, open this guide on a Mac and print it.

- Seven copies of the Customer Journey Map

Swipe to Explore ❯

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Expert Training

Activity: **30 min.**

Topic 1: NetPromoter

Before You Start

By now, you've completed the RetailMe courses that cover NetPromoter. You've learned what NPS is and how to use the system. Now it's time to try it!

1. Explore NetPromoter

Use the NPS system to find this information. Write the answers in your notebook.

- Your store's Red Zone NPS for last week.
- Your store's Personal Setup participation rate for last week.
- The key attributes in which your store achieved the highest and lowest score.

- To what do you attribute these scores?
- Run a report of all customers, throughout Apple Retail, who were passively satisfied. Which two attributes signify opportunities for improvement?
- Now run the same report for your store. Any differences?
- Of the programs included in NetPromoter, which has the highest satisfaction rate in your store?
- According to NetPromoter data, which Red Zone priority represents your store's biggest opportunity for improvement?
- What does NetPromoter tell you about your store's top two strengths? Your store's top two weaknesses?

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Expert Training

Activity: **15 min.**

Topic 2: Your Customer Journey

Journey Mapping

Journey mapping is a way to document a customer experience by identifying pivotal moments in the Customer Journey and assessing:

- What was happening in the store at that time
- How this was perceived by the customer
- The emotions that the customer experienced

Watch the Customer Journey video, then swipe back to this screen.

Swipe to Practice ❯

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Expert Training

Activity: **15 min.**

Topic 2: Your Customer Journey

Map Your Journey

Do you have any memorable shopping experiences? It doesn't matter if they were good or bad. Choose one and map your Customer Journey.

1. Use one of the printed copies of the Customer Journey Map.
2. Reflect on your shopping experience. What was your state of mind before you entered the store? Plot that point on the graph.
3. What prompted you to enter the store in the first place? What happened when you first entered the store? How did you feel? Plot that point on the graph.
4. What happened next? How did that make you feel? What caused you to feel that way? Plot it on the graph.
5. Plot until you come to the end of your Customer Journey.

Reflect

- How could any downturns have been avoided or corrected?
- What NetPromoter Score would you give your shopping journey?
- Was that score different at the end of your journey than it was at the beginning?
- If so, what specifically affected the change?

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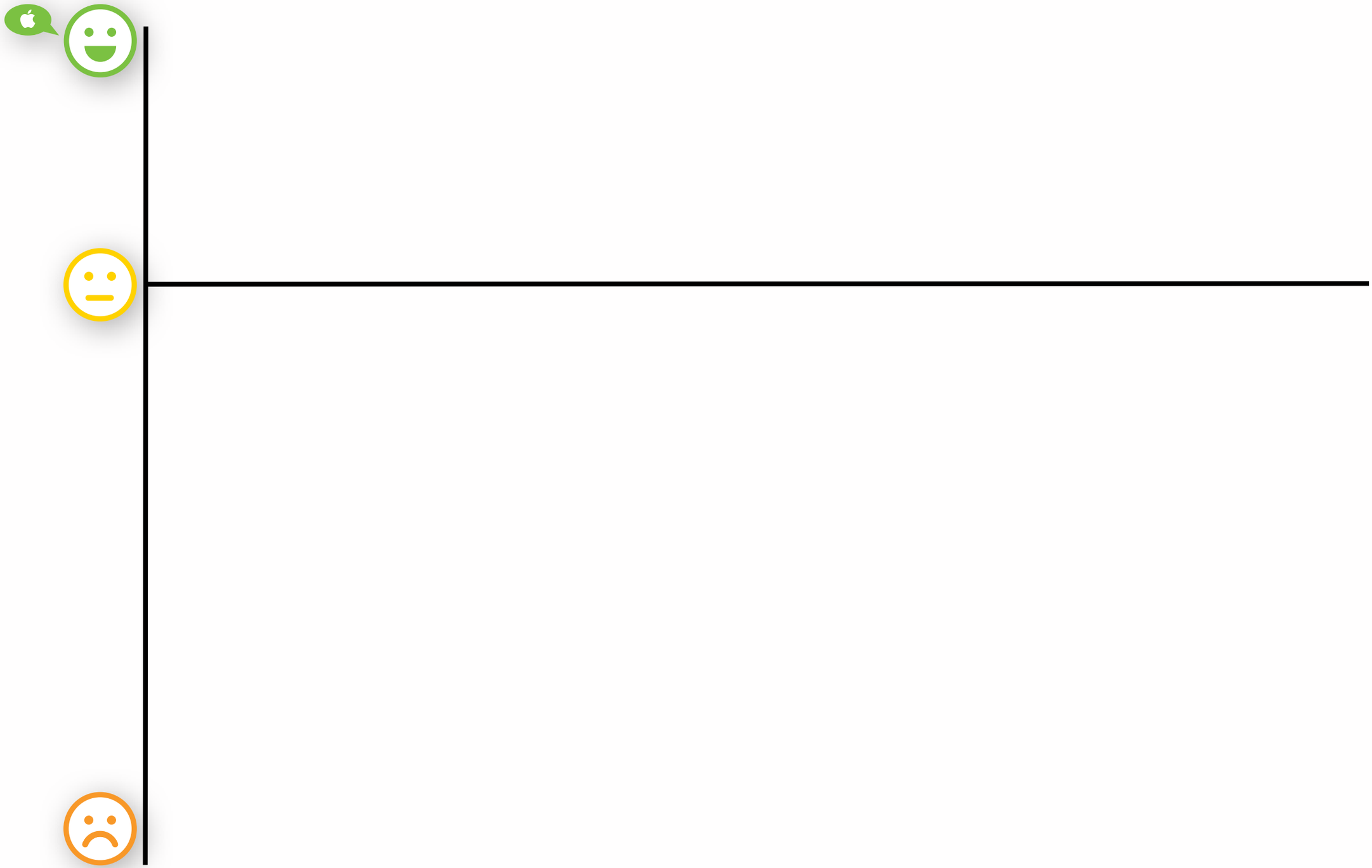
Your Customer Journey

Use the graph to chart a retail or service experience.



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Expert Training

Topic 3: Ownership and Loyalty

Experts create a world-class customer experience and build customer loyalty.

~Expert job description

Shopping Styles

Each customer shops differently, with different elements affecting the way they shop:

Confidence describes customers' perception of their knowledge and experience with a particular product or service.

- Customer who are highly confident may consider themselves to be experts, eager to share personal insights as part of their shopping experience.
- Customer who are less confident will look to you for knowledge and expertise.

Independence describes a customers' desire to guide the retail experience.

- Customer who are independent may be most comfortable performing their own test-drives and researching features and benefits. These customers may prefer self-checkout or online options to make purchases.
- Customer who are less independent prefer to be guided through the store, directed how to use features, and led through test-drives.

Loyalty describes customers' attachment to the Apple brand and culture.

- Customers who are very loyal choose Apple over other retailers, even if other locations offer comparable options, lower prices, or other perceived benefits.
- Customer who are less loyal shop anywhere that offers products or services that best fit their needs.

Next ❯

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Expert Training

Activity: **15 min.**

Topic 3: Ownership and Loyalty

Experts create a world-class customer experience and build customer loyalty.

~Expert job description

1. Discuss

Discuss these items. Use a flip chart or whiteboard space to record the group's ideas.

- What does a world-class customer experience mean at Apple?
- What is the difference between an owner and a loyal owner at Apple?
- How could these concepts be different for different customers?
- How would you modify your style in the Red Zone to meet each of the customers' styles?

Confident	Less Confident
Independent	Less Independent
Loyal	Less Loyal

Next ❯

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Expert Training

Activity: **45 min.**

Topic 3: Ownership and Loyalty

NetPromoter and the Customer Journey

- Find six customer comments in NetPromoter
  - Two Promoters
  - Two Passives
  - Two Detractors
- Use the printed copies of the Customer Journey Map.
- Use the comments to create a story about each customer and map each Customer Journey.

Reflect and Discuss

- Were there points when the interactions shifted positively or negatively?
- How do you think those customers might have felt?
- How could any downturns have been avoided or corrected?
- How could the interaction have been improved?
- Was the score different at the end of the Customer Journey than it was at the beginning?
- If so, what specifically affected that change?
- When you interact with a customer, what helps you to determine if the customer is moving up or down the scale?
- What transformed owners into Promoters?
- How can you create Promoters through your interactions with customers?

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Expert Training

Activity: **30 min.**

Topic 4: Meet the Whole Customer

Practice together.

1. Form groups of three.
2. Use the customer stories that you mapped in the last activity.
3. Roleplay each interaction. One person in each group will play one of these roles:
   - Customer
   - Expert
   - Observer
4. The Observer watches the interaction and gives feedback to the person who plays the Expert.
5. Rotate the roles during each interaction.

Observers: Consider these questions as you formulate your feedback:

- What was each customer's level of confidence, independence, and loyalty?
- How did the Expert approach the customer? Was it an effective way to engage the customer? Why?
- Did the Expert use high-value probing questions? Were they effective? Why?
- What specific actions did the Expert take during the interaction? Were they effective?
- How did the Expert modify his or her style to meet customer's needs?

Next ❯

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Expert Training

Activity: **15 min.**

Topic 5: Exchange Journal

Consider these questions as you reflect on your learning experience:

- Did this learning experience help you to view customers more holistically?
- What will you change about how you connect and interact with customers?
- How can you inspire other team members to tailor their interactions with customers?
- How do you address a customer's concerns with a solution you have presented?
- What is the most important area in which you can continue to grow as an Expert?
- How will your teammates, customers, or leadership team know that you have made this improvement?

Partner with a Leader

Partner with a Leader to review and discuss your learning experience.

Next ❯

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Expert Training

Resources

RetailMe Courses

- *NetPromoter Introduction*
- *NetPromoter System*

Pathways

- “Approach with a Product”
- “Body Language”
- “Stepping Up Service”

Feedback

Give us your feedback on this training.

- Participant Feedback Survey
- ISGT and Leadership Feedback Survey

Congratulations! You’ve completed Module 3: “Create Loyal Owners.”

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Expert Training

Module: **1 hr., 50 min.**

Module Overview

Assess your skill level at each Expert job responsibility. Identify the Lominger competencies associated with the Expert role. Identify your strengths and growth opportunities as an individual Expert, and as a team.

Audience

This module is designed for Experts who have at least three months of experience in the role.

Key Messages

- It's important to recognize your strengths and opportunities.
- Well-rounded Experts use a variety of skills and strive to achieve balance in how they use them.
- Your teammates can help you to develop your growth opportunities.

Objectives

- Identify the Expert job responsibilities in which you are skilled and unskilled.
- Identify Lominger competencies associated with the Expert role.
- Explain what it means to overuse a skill.
- Explain why being a well-rounded Expert is important.
- Identify one action you can take to develop the competency that's your biggest growth opportunity.
- Identify one action you can take to inspire others to exceed customers' expectations in the Red Zone.

Topic 1:
Expert Skills
10 min.

Topic 2:
Expert Profiles
35 min.

Topic 3:
Expert Competencies
50 min.

Topic 4:
Exchange Journal
15 min.

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Expert Training

Room Setup

- Flip chart paper or whiteboard space
- Flip chart or dry-erase markers
- Notebook or paper for each Expert.
- Ballpoint pen for each Expert

Materials

Each participant should have a RetailMe iPad with these items downloaded:

- This guide
- The *Expert Job Description*

Print Materials

Tap the document name below to view and print. If no AirPrint printer is available, open this guide on a Mac and print it.

- Expert skill ranking sheet

Swipe to Explore ❯

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Expert Training

Activity: **10 min.**

Topic 1: Expert Skills

1. Rate yourself

Go to the Expert job description on RetailMe and rate your skill level for each item on the list of responsibilities. Use a scale of 1-10, with 1 being unskilled and 10 being highly skilled.

2. Reflect

Based on your ratings, what are the two responsibilities you most need to improve? Write them down.

Next ❯

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Rate Your Skills

Rate your skill level for each item on the list of Expert responsibilities. Use a scale of 1-10, with 1 being unskilled and 10 being highly skilled.

- Embody the behaviors associated with the greatest customer experiences in the world.
- Use the APPLE Steps of Service to provide a complete solution during every customer interaction. Be a model of these steps.
- Exceed daily ownership goals, and leverage knowledge to achieve top quartile performance in iPhone, Mac, iPad and Accessories UPH (units per hour).
- Be a performance leader in customer loyalty (NetPromoter), One to One, AppleCare and additional paid services.
- Be a role model to teammates, demonstrating the ability to achieve current and future Red Zone performance goals.
- Openly give and receive timely, honest, and specific feedback.
- Deliver incredible experiences to single and multiple customers while navigating complex tasks.
- Champion change by embracing new technology, priorities, programs, and customer or employee initiatives.
- Learn constantly through on-the-job experiences, RetailMe content, and other educational opportunities as provided.
- Maintain a deep level of knowledge for all store products and promotions, accessories, iOS carrier plans and activation processes.)
- Assist customers through their journey in the store using all necessary systems (Red Zone purchases, Family Room appointments, workshops, product launches, etc.)
- Embrace business sales and contribute to the overall Business team by identifying and transacting business ownership experiences. Contribute to team success in all store areas while remaining in scope of role.
- Be a beacon of knowledge in Apple hardware, software, accessories, and third-party products.
- Focus on continued improvement of both the internal and the external customer experience.

Based on these ratings, what are two responsibilities that you most need to improve?

1. _____

2. _____

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Expert Training

Activity: **35 min.**

Topic 2: Expert Profiles

1. Identify skills

The next several pages each contain a description of a person who could be an Expert in an Apple Retail Store—an Expert profile.

Study each profile individually. One person should read each profile aloud. Then, as a group, answer these questions.

- Which Expert job responsibility is this person likely most skilled?
- Which Expert job responsibility is this person likely least skilled?

Use one piece of flip chart paper to write the answers for each Expert profile. (You will be adding information to each page later.)

Profiles

Profile 1: Chris
Profile 2: Alex
Profile 3: Jamie
Profile 4: Sam
Profile 5: Bailey
Profile 6: Frankie
Profile 7: Rowan

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Expert Training

Expert Profile 1: Chris

Being the top performer is Chris' passion. Nothing feels better than knowing he is the best at what he does. Chris keeps careful track of personal sales numbers and NPS scores, striving for improvements and comparing them with other Experts. Chris is excited by competition and enjoys overcoming challenges successfully.

Back to Topic

Competencies

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Expert Training

Expert Profile 2: Alex

Promoting customer loyalty is Alex's passion. Alex has an innate sense of the best way to connect with different kinds of customers, and feels best when she knows they've had the amazing personal experience that no other store offers. Alex knows that no matter what they bought, they will continue to come back.

Back to Topic

Competencies

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Expert Training

Expert Profile 3: Jamie

Building a strong team is Jamie's passion. Jamie strives to improve the performance of every individual in the Red Zone and gives feedback regularly to build everyone's skills. Jamie seeks opportunities to model best practices and provide the support and guidance to measurably improve the team's performance.

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Competencies

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Expert Training

Expert Profile 4: Sam

Connecting with his coworkers is Sam's passion. Sam is the energy that drives the Red Zone, a spark of enthusiasm and positivity that keeps the team going, a model first follower and continuous source of inspiration. Sam takes an interest in his colleague's lives and fosters deep personal relationships.

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Expert Training

Expert Profile 5: Bailey

Knowledge of our products and services is Bailey's passion. When anyone in the Red Zone has a question about features or benefits, she has the answers. Bailey takes pride knowing about all the products we sell, and feels comfortable proposing complete solutions that include software and accessories.

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Expert Training

Expert Profile 6: Frankie

Promoting ownership is Frankie's passion. Every time Frankie closes a sale, he feels that rush of excitement, and can't wait to do it again. Nothing makes Frankie happier than seeing a customer make the decision: "Yes, I'll take that home now." He strives to make the customer happy through connecting them with our great products.

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Expert Training

Expert Profile 7: Rowan

Sharing the latest news is Rowan's passion. Rowan avidly seeks out places to hear what people are saying about new products or initiatives. She actively reads NPS comments and keeps tabs on all the latest blogs, articles, and media feeds. To do her job well, Rowan feels it's important to know what customers are saying about our products and services.

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Expert Training

Activity: **50 min.**

Topic 3: Expert Competencies

1. Identify competencies

- Use the links in the list of Lominger Competencies for the Expert role.
- Read the definitions for each Expert competency, including skilled, unskilled, and overused.
- Identify the Lominger competencies exemplified by each Expert in the Expert profiles.
- Add these competencies to the flip chart page for each Expert profile.

2. Discuss

Discuss these questions. Write the answers on a flip chart:

- How does each Expert competency relate to the Expert job description?
- How does skilled use of each competency improve performance in the Red Zone?
- Is there a competency at which your Expert team is very skilled? Is there a competency at which your Expert team is unskilled?
- How could overuse of each competency be detrimental?
- Are there any skills that you overuse? Get feedback from your teammates if you're not sure.
- What does it mean to be a well-rounded Expert?
- How can you take advantage of each others' strengths?
- How can you as an Expert team inspire others in the store to exceed customers' expectations?

Expert Competencies

Price of Admission

Customer Focus

Drives for Results

Approachability

Technical Learning

Presentation Skills

Listening

Skill Building

Functional and Technical Skills

Interpersonal Savvy

Peer Relationships

Action Oriented

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Expert Training

Customer Focus

Lominger Competency 15

Skilled

Is dedicated to meeting the expectations and requirements of internal and external customers. Gets first-hand customer information and uses it for improvements in products and services. Acts with customers in mind. Establishes and maintains effective relationships with customers and gains their trust and respect.

Unskilled

Doesn't think of the customer first. May think he/she already knows what they need. May focus on internal operations and get blindsided by customer problems. May not make the first move — won't meet and get to know customers. Uncomfortable with new people. May be unwilling to handle criticisms, complaints, and special requests. May not listen well to customers, may be defensive. May not make the time for customer contact.

Overused Skill

May be overly responsive to customer demands. May be too willing to change established processes and timetables to respond to unreasonable customer requests.

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Expert Training

Drive for Results

Lominger Competency 53

Skilled

Can be counted on to exceed goals successfully. Is constantly and consistently one of the top performers. Very bottom-line oriented. Steadfastly pushes self and others for results.

Unskilled

Doesn't deliver results consistently. Doesn't get things done on time. Wastes time and resources pursuing non-essentials. Something always gets in the way — personal disorganization, failure to set priorities, underestimating timeframes, overcoming resistance. Not bold or committed enough to push it through. Procrastinates around whatever gets in his/her way. Doesn't go all out to complete tasks. Does the least to get by.

Overused

May go for results at all costs without appropriate concern for people, teams, due process, or possibly norms and ethics. May have high turnover under him/her due to the pressure for results. May not build team spirit. May not celebrate and share successes. May be very self-centered.

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Expert Training

Approachability

Lominger Competency 3

Skilled

Is easy to approach and talk to. Spends the extra effort to put others at ease. Can be warm, pleasant, and gracious. Is sensitive to and patient with the interpersonal anxieties of others. Builds rapport well. Is a good listener. Is an early knower, getting informal and incomplete information in time to do something about it.

Unskilled

Distant, not easy to be around. Not comfortable with first contacts. May be shy, cool or a person of few words. Doesn't reveal much, hard to know what he/she is really like. Doesn't build rapport, may be a "let's get on with it" type. May be a poor listener or appear uninterested. May not pick up on social cues that others would recognize. May be tense. Transactions don't go smoothly.

Overused Skill

May waste too much time building rapport in meetings. May be misinterpreted as easygoing or easy to influence. May have too strong a desire to be liked. May avoid necessary negative or unpleasant transactions. May try to smooth over real issues and problems.

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Expert Training

Technical Learning

Lominger Competency 61

Skilled

Picks up on technical things quickly. Can learn new skills and knowledge. Is good at learning new industry, company, product, or technical knowledge — like internet technology. Does well in technical courses and seminars.

Unskilled

Doesn't learn new technical skills readily. Is among the last to learn or adopt new technology — like internet technology. May be stuck and wed to past technologies and resist switching to new ones. May be intimidated by technology. May lack experience or exposure with new technologies. May not be interested in things technical or areas involving lots of detail. May not know how to or may reject using others to learn new technologies.

Overused Skill

May learn, but not act. May overdo learning at the expense of using it. May be seen as too academic. May not relate well to those who can’t catch on as quickly.

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Presentation Skills

Lominger Competency 49

Skilled

Is effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, direct reports, and bosses. Is effective both inside and outside the organization, on both cool data and hot and controversial topics. Commands attention and can manage group process during the presentation. Can change tactics midstream when something isn't working.

Unskilled

Not a skilled presenter in varying situations. May be shy. May be disorganized. Presentations lack focus. May have a flat or grating style. Doesn't listen to audience. May have personal idiosyncrasies and habits that get in the way. May be unprepared for or can’t handle tough questions. May always present the same way, not adjusting to audiences. May lose his/her cool during hot debate. May be nervous, even scared when speaking.

Overused Skill

May try to win with style and presentation skills over fact and substance. May be able to wing it and dance without really being prepared. May be able to sell things that shouldn’t be sold.

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Expert Training

Listening

Lominger Competency 33

Skilled

Practices attentive and active listening. Has the patience to hear people out. Can accurately restate the opinions of others even when he/she disagrees.

Unskilled

Doesn't listen well.Cuts people off and finishes their sentences if they hesitate. Interrupts to make a pronouncement or render a solution or decision. Doesn't learn much from interactions with others. Appears not to listen or is too busy constructing his/her own response. Many times misses the point others are trying to make. May appear arrogant, impatient or uninterested. May listen to some groups/ people and not to others Inaccurate in restating the case of others.

Overused Skill

May spend too much time listening. May avoid unnecessary action. Others may confuse listening with agreement.

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Expert Training

Functional/Technical Skills

Lominger Competency 24

Skilled

Has the functional and technical knowledge and skills to do the job at a high level of accomplishment.

Unskilled

Not up to functional or technical proficiency. Makes technical/functional errors. Judgment and decision making marginal because of lack of knowledge. May be stuck in past skills and technologies. May be inexperienced, new to the area, or lack interest in it. Lack of detail orientation to go deep. May not make the time to learn.

Overused Skill

May be seen as too narrow. May overdevelop or depend upon technical and functional knowledge and skills at the expense of personal, interpersonal, and managerial skills. May use deep technical knowledge and skills to avoid ambiguity and risk.

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Expert Training

Interpersonal Savvy

Lominger Competency 31

Skilled

Relates well to all kinds of people, up, down, and sideways, inside and outside the organization. Builds appropriate rapport. Builds constructive and effective relationships. Uses diplomacy and tact. Can diffuse even high-tension situations comfortably.

Unskilled

Doesn't relate smoothly to a variety of people. May not build relationships easily — may lack approachability or good listening skills. Doesn't take the time to build rapport. May be too raw and direct at times. May be excessively work oriented or intense. May be impatient to get on with the agenda; judgmental or arrogant toward others. May not read others well. May freeze or panic in the face of conflict, attack or criticism. May be shy or lack confidence around others.

Overused Skill

May be able to get by with smooth interpersonal skills. May spend too much time building networks and glad-handing. May not be taken as substantive by some. May not be a credible take-charge leader when that’s necessary. May have some trouble and freeze when facing serious conflict.

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Expert Training

Peer Relationships

Lominger Competency 42

Skilled

Can quickly find common ground and solve problems for the good of all. Can represent his/her own interests and yet be fair to other groups. Can solve problems with peers with a minimum of noise. Is seen as a team player and is cooperative. Easily gains trust and support of peers. Encourages collaboration. Can be candid with peers.

Unskilled

Not good at lateral cross boundary relations. Doesn't strike fair bargains or understand what peers expect or need. Not open to negotiation. A loner, not seen as a team player, doesn't have the greater good in mind. May withhold resources from the other team members. May not respect their functions or disciplines and somehow communicates that. May be very competitive, play and maneuver for advantage and withhold information. May have a chilling effect on the entire unit because he/she won't play. May deal with lateral conflict noisily or uncooperatively.

Overused Skill

May touch base with too many peers and be overly concerned with making everyone happy. May be too accommodating. May invest too much in peer relationship at the expense of others. May be uncomfortable with relationship where everyone’s not equal.

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Expert Training

Action Oriented

Lominger Competency 1

Skilled

Enjoys working hard. Is action oriented and full of energy for the things he/she sees as challenging. Not fearful of acting with a minimum of planning. Seizes more opportunities than others.

Unskilled

Slow to act on an opportunity. May be overly methodical, a perfectionist, or risk averse. May procrastinate. May not set very challenging goals. May lack confidence to act. May know what to do, but hesitates to do it. May not be motivated; may be bored with the work or burned out.

Overused Skill

May be a workaholic. May push solutions before adequate analysis. May be non-strategic. May over manage to get things done too quickly. May have personal and family problems due to disinterest and neglect. May not attend to important, but non-challenging duties and tasks. May ignore personal life, burn out.

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Activity: **15 min.**

Topic 4: Exchange Journal

Consider these questions as you reflect on your learning experience:

- Which are your strongest and your weakest competencies?
- How can you develop the competency that represents your biggest growth opportunity?
- Are there any competencies in which you overuse the skills? How will you modify your behavior?
- How can you take advantage of your strengths to support your development?
- How can you support your fellow Experts in their development?
- How can you as an individual Expert inspire others in the Red Zone to exceed customers' expectations?

Partner with a Leader

Partner with a Leader as an Expert team to create an action plan to develop one team competency.
Partner with a Leader individually to review and discuss your learning experience.

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Expert Training

Resources

MyPlan

- Lominger Competencies for the Expert role
- Lominger Competencies

RetailMe

- Expert job description
- Lominger FYI For Your Improvement (ePub in Materials)

Feedback

Give us your feedback on this training.

- Participant Feedback Survey
- ISGT and Leadership Feedback Survey

Congratulations! You've completed Module 4: "Expert Competencies."

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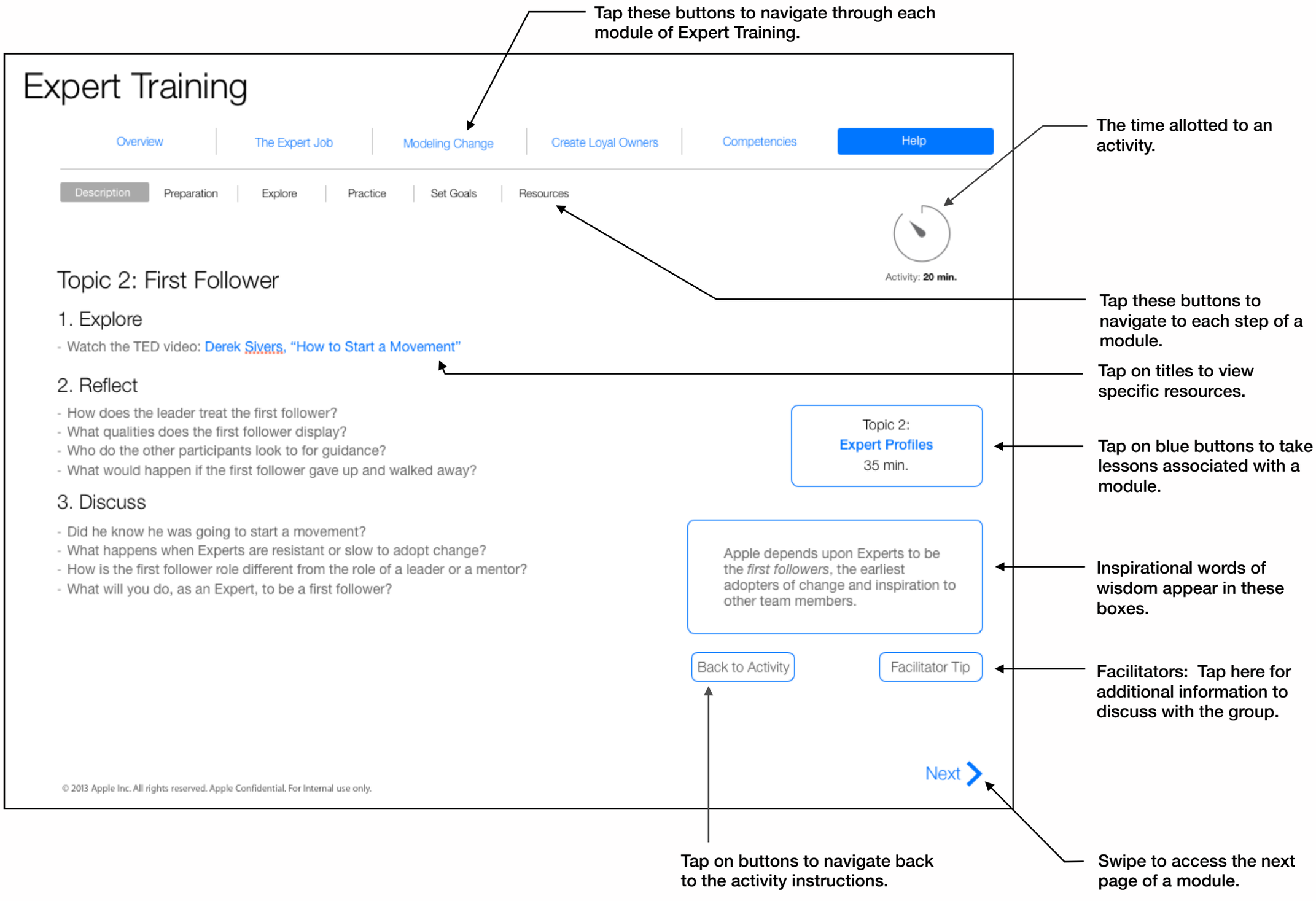
Expert Training

Overview | The Expert Job | Modeling Change | Create Loyal Owners | Competencies | Help


Tap these buttons to navigate through each module of Expert Training.
Expert Training
Overview
The Expert Job
Modeling Change
Create Loyal Owners
Competencies
Help
Description
Preparation
Explore
Practice
Set Goals
Resources
The time allotted to an activity.
Activity: 20 min.
Topic 2: First Follower
1. Explore
- Watch the TED video: Derek Sivers, "How to Start a Movement"
2. Reflect
- How does the leader treat the first follower?
- What qualities does the first follower display?
- Who do the other participants look to for guidance?
- What would happen if the first follower gave up and walked away?
3. Discuss
- Did he know he was going to start a movement?
- What happens when Experts are resistant or slow to adopt change?
- How is the first follower role different from the role of a leader or a mentor?
- What will you do, as an Expert, to be a first follower?
Tap these buttons to navigate to each step of a module.
Tap on titles to view specific resources.
Topic 2:
Expert Profiles
35 min.
Tap on blue buttons to take lessons associated with a module.
Apple depends upon Experts to be the first followers, the earliest adopters of change and inspiration to other team members.
Inspirational words of wisdom appear in these boxes.
Back to Activity
Facilitator Tip
Facilitators: Tap here for additional information to discuss with the group.
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Next
Tap on buttons to navigate back to the activity instructions.
Swipe to access the next page of a module.

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